

Kentucky Education Technology System (KETS) Electronic Mail Standards and Best Practice Guidelines

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Introduction

Kentucky has achieved a level of sophistication with KETS electronic mail such that districts can begin providing good value-added services to enhance the sharing of e-mail and documents within the district, among districts, and among peers of the same group within and outside the district. As called for by the *Master Plan for Education Technology*, Kentucky made a strategic decision five years ago to design a statewide e-mail system with the primary objective of providing equitable access from every Kentucky classroom and school or district office to a consistent level of basic and value-added mail services with high reliability. To ensure that implementation is equitable and consistent, the design requires a high level of cooperation between the state and local levels which includes consistency in standard naming conventions, mail system configurations, security, and access rights. While there is and will continue to be a great deal of flexibility at the district level, there are certain basic standards related to functionality, reliability and ease of use that must be applied statewide if the *Master Plan* vision is to be realized. Because statewide email implementation is a partnership, and not a single centralized system, its success hinges on a common level of trust and cooperation between each district and state department and among districts. Any district who chooses not to follow the basic standards as a full partner in the statewide email system does two things: 1) negatively impacts the quality of service within their own district; and, 2) degrades or even shuts down e-mail services for other districts and schools within their own region and perhaps in every region.

The purpose of this communication is to clearly communicate the basic standards for statewide electronic mail, to share best practice guidelines, and to describe the first of the major value-added email services to be available statewide - - State Level Shared Distribution Lists. These standards will ensure stability in the electronic mail system during a time of rapid expansion so that we can continue to move ahead. Microsoft Mail is the statewide standard for electronic mail. The standard was implemented with Microsoft Mail v3.5, and continues with version 5.x (Exchange). This document references Microsoft Exchange from this point on.

The majority of this content has been presented to District Technology Coordinators in Exchange Awareness sessions. This document is incorporated by reference into the *Master Plan for Education Technology*.

Chapter One Basic Help Tools: The Getting Started Guide, Online Help and the KETS Helpdesk

The online help provided for the Microsoft Exchange Client is designed to assist users with everything from the most basic to the most advanced e-mail functions. The Exchange Client refers to the Microsoft Exchange software which the user runs to access e-mail. The "Getting Started with Microsoft Exchange Client" guide is the best place for a new user to learn how to get the most value from Exchange. The other Help guides are the more experienced user's best resource when learning an advanced feature. "Getting Started" and the entire online Microsoft Exchange Help manual are designed to work together to assist any user get a job done as quickly and effortlessly as possible. The Help guides have detailed instructions for almost anything an Exchange user can do: Create and Manage Public Folders, Use the Inbox Assistant; Send on Behalf of Permissions, etc.

Much of the information presented in this document comes directly from the Online Help guides. All KETS users should refer to Microsoft Exchange Online Help first when questions and problems arise. Districts should also ensure that all users have access to the Getting Started Guide. The guide can be found on the Exchange Client CD, which is available for purchase off the KETS Microsoft software contract form.

Chapter Two Using the Getting Started Guide

The Getting Started Guide provides information about features, short self-guided tutorials, and tips and strategies for using the Microsoft Exchange Client.

- ⇒ All KETS Exchange Administrators, usually the DTC, should have this information handy.
- ⇒ All KETS email users should read this guide as a pre-requisite for receiving an e-mail address.

WHY USERS SHOULD BE EXPECTED TO USE THE GUIDE?

Many of the questions that District Technology Coordinators (DTCs) receive about Exchange mail could have been answered by consulting the guide. Allowing district users access to this information saves people time and resources. Making the guide required reading for all e-mail users (staff, student and teachers) re-enforces independent learning - - making them more self-sufficient and therefore more confident users, more accountable and therefore less demanding users, and more engaged and therefore more advanced users. Users who are allowed to become totally dependent on the school or district technician for assistance rarely progress beyond the basic use levels, become easily frustrated when immediate help is not available, and are far less likely to use email for teaching and learning.

HOW DOES A DISTRICT MAKE THE GUIDE AVAILABLE?

This guide is available in two formats: online in a folder; and, as a printable document. The folder is available on the Microsoft Exchange Server compact disc. This means that the folder can be moved to the Exchange server where it will be available as a public folder for district-wide use.

Steps for Moving the Guide to a Public Folder

Every district has in place an Exchange Administrator Mailbox. From a Windows 95/NT PC, set up an Exchange profile for the Exchange Administrator mailbox (Adair Exchange Administrator).

The Exchange Administrator should:

- Step 1. Copy Sampapps.pst from the Exchange Server CD to the hard drive and make note of the file location.
- Step 2. From Windows Explorer, Right click on the file and choose Properties.
- Step 3. Uncheck the Read Only attribute.
- Step 4. Login to Exchange as the Exchange Administrator.
- Step 5. Go to Tools>Services.
- Step 6. Click Add. Choose Personal Folders. Click OK.
- Step 7. Enter the path to the Sampapps.pst file, which is a Personal Folders file.
- Step 8. Select Open>OK>OK>Next>Finish>Close to add service to a profile.
- Step 9. Go back to inbox, see Personal Folders. The Getting Started Guide should be seen.
- Step 10. Copy the contents of the Getting Started Guide to a Public Folder, to be shared throughout the district. This can be accomplished by dragging the folder into the District's public folder.

HINT! If Public Folders are not named and organized in a way that makes sense to the users, the Folders will not be used. It is very important to design and use consistently a naming

convention and organization scheme, which everyone in the district can use and understand.

Chapter Three Online Help

The Microsoft Exchange Client Help section provides step-by-step instructions for tasks, conceptual information for each task, and context-sensitive Help. Information can be found in several ways:

CONTENTS

Each chapter in “Contents” is devoted to a particular category of features; for example, “Addressing Messages.” In addition, there is a “Reference Information” chapter where one can find help on commands and dialog boxes, toolbars and buttons, keyboard shortcuts, and other information.

INDEX

The “Index” is a comprehensive, book-like index that contains an alphabetical list of all the information in the online documentation. The user can jump from Index entries to overviews and procedures, command and dialog box topics, and definitions of terms and screen elements.

FIND

Using the Find feature, a user can search for and find topics related to a general word or phrase that they have specified.

CONTEXT-SENSITIVE HELP

This tool allows the user to select on on-screen element, such as a window, menu command, dialog box, or toolbar button by pointing to the time with the mouse. This means that the user does not have to know the actual name of the screen element to receive help on its use.

FOLDER DESIGN CUE CARDS

The Folder Design Cue Cards guide users through the process of creating and designing a public folder.

Chapter Four The KETS Helpdesk

Perhaps one of the best resources for getting help with the Exchange client is the KETS Helpdesk. Each and every public school and district office in Kentucky has two Technology Points of Contact (TPOC). These TPOCs can call the KETS helpdesk, at no cost to the school or district, whenever questions or problems arise with any KETS standard hardware or software. The KETS Helpdesk does not make onsite visits, but does aid in problem determination and resolution, and can “conference in” the software designers’ own helpdesks, again, at no district cost. If you are uncertain who your TPOCs are, or if you have any, please ask you District Technology Coordinator or KETS Engineer.

Chapter Five Global Address List (GAL)

With initial implementation of Microsoft Exchange completed throughout the schools and district offices, there are currently over 45,000 Kentucky teachers, administrators, staff, and students communicating globally through the use of the KETS E-mail services. It is crucial to these users, and future users, that the Global Address List be accurate and easy to use. It is also extremely important that the information it contains be useful and useable.

WHY CONSISTENCY IS IMPORTANT

There are many examples that demonstrate the need to maintain consistent, accurate and standardized naming across a large email system. These standards must be created for both user accounts and lists of users, or Distribution Lists. Fundamentally, if people cannot locate others in the system easily and dependably they will not use email.

District or School Specific Groups:

- **Bob's 8th Grade Math Class**
- **All Gannon Elementary Staff**
- **The Moss Yearbook Staff**

The Exchange address listings above, which are actually small Distribution Lists, may make a lot of sense to someone inside the school or district where Bob, Gannon Elementary, and The Moss Yearbook are located but they make no sense to someone outside the district on the statewide Global Address List - - these entities could be anywhere!

- **11th Grade Teachers**

On the current KETS Global Address List there are many addresses for Distribution Lists that appear to be statewide groups when they are actually a group for a particular school or district. These addresses, like the one above, appear to make sense. It would be reasonable for a teacher to assume that communicating with this list on the GAL would put he/she in touch with 11th grade teachers across the state. In fact, this list is for 11th grade teachers in a single district. This is confusing and frustrating. Districts must consider the address names they create in the context of where the address will and will not appear.

It is easy using Exchange to make these district-specific groups visible within the district, or a particular school, and not visible outside the district.

For the reasons cited above:

⇒ District or school specific groups should not be visible in the statewide Global Address List.

Groups of People from Multiple Districts

Organizations or groups that are made up of multiple people from different districts need Distribution Lists but these Lists generally do not need to be seen statewide and, therefore, should not appear on the GAL. For example: **Region 8 Technicians** is not a group that needs to be visible statewide.

⇒ Distribution Lists composed of multiple people from different districts should use the SMTP address (in this case, R8techs@k12.state.ky.us) for the List and have each member place that address in their personal address book.

Statewide Groups

Only those Distribution Lists that have been identified as KETS State Level Shared Distribution Lists will be made available to every district in the state and will appear on the Global Address Listing. Those that are not identified in this category will be visible within the district only.

The Statewide KETS Exchange Administrator and the Office of Education Technology will rely upon the advice of the Kentucky Association of Technology Coordinators to ascertain which groups, composed of entities from multiple districts, should have KETS State Level Shared Distribution List status.

Other Distribution Lists which will appear on the GAL are selected Lists originating from the Kentucky Department of Education and other state government agencies with which all districts communicate routinely.

Chapter Six Distribution Lists

One of the longest awaited and most often requested e-mail services is shared Distribution Lists. A shared Distribution List allows you to send an e-mail quickly to a large group of individuals using a single address rather than an address for each member of the group. For example: a Superintendent can quickly send a note to all the principals within the district; a high school principal can quickly send an e-mail note to all the other high school principals within the district; or, one principal can email all the high school principals in the state. Studies show that 70% of a person's e-mail will go to the same individuals or groups on a fairly consistent basis. One of the great benefits of the KETS e-mail system is this ability to communicate quickly and easily with large groups of people without having to type each person's name on the "TO:" line each time you want to send an e-mail. Distribution Lists reduce the hassle of finding names each time and therefore increase the probability that users will turn to email as the first and best means of communication.

Distribution Lists must be kept up-to-date or they will not be used. Today in Kentucky, Distribution Lists are used primarily within individual districts by teachers, school leaders and district office staff to communicate among themselves. However, Statewide Shared Distribution Lists allow those same individuals to communicate on a broad scale with other teachers and school leaders. Across the state, these groups can find others with whom they have a lot in common but little opportunity to meet. Statewide Distribution Lists open up lines of communication and frequently result in collaborative work across districts which otherwise could not occur.

BUILDING AND SUPPORTING STATEWIDE SHARED DISTRIBUTION LISTS

Many Kentucky districts have created e-mail Distribution Lists and use them daily. Such as:

- **All Johnson Co Prin**

KETS can build upon that district level list and others like it to create:

- **All State Prin** Distribution List.

At the state level, the Office of Education Technology has the capacity to roll district level Distribution Lists into Shared State Level Distribution Lists that can be used by every school and district office. For example:

- **All State EL Prin**
- **All State MS Prin**
- **All State HS Prin**
- **All State Prin**
- **All State Supt**

The only people who can send to a KETS State Level Shared Distribution Lists are those that are members of the List. For example, only the elementary school principals can send e-mail to the shared Distribution List **All State EL Prin**. This stimulates communication and information sharing on issues unique to the group. Although everyone cannot send to them, the **All State** level lists will be visible on the Global Address List.

Certain district level lists (e.g., **All Johnson Co EL Prin**) that feed into the State Level Shared Distribution List will be visible throughout the state. The district, however, retains control over who can or cannot send to its own list from outside the district.

Vendors and other organizations that send large volumes of unsolicited marketing and sales-related junk mail will not have access rights to any All State level list.

For any Distribution List to have value the names in the list must be kept as current and up-to-date as possible. The All State level lists will only be as up to date as the district lists which feed it. The Statewide Exchange Mail Administrator will send out reminders about updates but the driving force behind keeping any List updated will be its members. If the Shelby County Superintendent uses the **All Shelby Co Prin** list routinely to communicate to his principals, or if the principals within Shelby County use that list to communicate frequently among themselves, those users are going to be vocal and insistent about the names being kept as current as possible. Therefore, the All State level list for Principals will increase in accuracy as districts increase use the feeder lists.

Each All State Shared Distribution List will have a Shared Folder area at the state level for the collection and sharing of documents.

All State Lists will expand to other groups during the 1998/99 school year. Those likely to be implemented are:

- **All State Teachers**
- **All State Librarians**
- **All State Counselors**
- **All State HS Math Teachers.**

To support All State Shared Distribution Lists, the KDE Web site will post alerts with notification of which districts are currently experiencing network or e-mail problems. This will allow the sender to choose an alternate means of communication for those users if the message is extremely urgent.

Chapter Seven Distribution Lists vs. Listserves

Many Kentucky educators currently use **KYSUPT** or **KYDTC** listserves. An Exchange Distribution List is not the same as a listserv. A Distribution List is a much more preferable means of communication.

A Listserv is maintained by a single individual for hundreds, if not thousands, of users. For groups of significant size, naming consistency and accuracy becomes a major problem. It has been challenging to keep the 176 names current on the KYSUPT listserv; keeping that list current for 1400 principals would be virtually impossible.

The Exchange e-mail system differs from a Listserv because it does not require that a single person keep up with all name changes. Instead, the KETS e-mail system takes the names from Distribution Lists maintained by districts and builds upon them to create All State Level Distribution Lists.

Chapter Eight Standards for District Distribution Lists Which Feed Statewide Shared Distribution Lists

The District Distribution Lists that are created and maintained to feed All State Shared Distribution Lists are visible outside of each district. In this sense, they are very different from those internal Distribution Lists are unique to and only visible within a single district. A fundamental difference between these two types of lists is the "Trust Level" setting, which is

found in the Advanced Tab of the Properties of the Distribution List. The way in which these rights are set up is extremely important.

TRUST LEVELS FOR DISTRICT-SPECIFIC LISTS

When the Administrator creates a district Distribution List, its default setting allows only local district e-mail accounts to send to it. In other words, everyone within the district would be able to use the Distribution List by default, but no other district would be able to. The default Trust Level setting is "20."

⇒ Except for those lists which feed All State Lists, district Distribution Lists must set to a Trust Level of 20. Each district is responsible for reviewing and updating Trust Levels as appropriate.

(Distribution Lists approved for All State use, and those which feed All State Lists, must be set to a Trust Level of 15, as explained in the following section.)

PARAMETERS FOR DISTRICT LEVEL COMPONENTS OF AN ALL STATE SHARED DISTRIBUTION LIST

As described in the attached checklist, each Kentucky district is responsible for creating the district component of five State Level Shared Distribution Lists:

- **ALL STATE SUPT**
- **ALL STATE PRIN**
- **ALL STATE ES PRIN**
- **ALL STATE MS PRIN**
- **ALL STATE HS PRIN**

⇒ These five district level components of the State Shared Distribution Lists must be set at Trust Level 15, meaning that they will be visible outside of your district.

⇒ Delivery Restrictions on these five district level Distribution Lists must be set as follows:

District Level List	"Accept Messages From" must be set to:
All Principals All Elementary Principals All Middle School Principals All High School Principals	<ul style="list-style-type: none">• All State Principals• Admin Principals Distribution List
All Superintendent	<ul style="list-style-type: none">• All State Superintendents• Admin Superintendents Distribution List

The Admin list is maintained at the state level and allows a limited number of key individuals to send to the list (for example: Dr. Cody, Deputy Commissioner Kimbrough, etc.)

This procedure is called "nesting Distribution Lists," which means a single Distribution List (the most inclusive) contains other Distribution Lists (the various pieces which make up the whole). When Distribution Lists are "nested," a change made to a mailbox in one of the component lists is made to the other component lists as well as the State Level Distribution List.

For example, the statewide-shared Distribution List **All State Prin** contains 3 Distribution Lists:

- **All State EL Prin**
- **All State MS Prin**
- **All State HS Prin**

Each of these 3 Distribution Lists contains 176 Distribution Lists, one from each school district (e.g. **All State EL Prin** contains **All Rowan Co EL Prin** and 175 others). Nesting means that the responsibility for maintaining changes can be retained by the administrator of each component list.

- ⇒ Each district must have a Primary Distribution List Administrator, whose responsibility it is to oversee the management of all district level Distribution Lists (will often be district Exchange Administrator) and work with the State Level Distribution List Administrator.
- ⇒ Each Distribution List must have a named List Administrator, whose responsibility it is to maintain the accuracy of the addressing information for the particular list. (This may also be the Primary District List Administrator; the point is that each List must have a named Administrator.)

It is recommended that the district's Primary Distribution List Administrator assign building level staff to the role of individual List Administrator, rather than attempting to manage each list him/her self. Accuracy will be better if the owner or administrator of each Distribution List is as familiar with the members as possible. The nesting ability, applied at the district level, enables any changes made to a building level list to update district-wide lists as appropriate.

Districts have the choice of creating a single Distribution List for all members of a group within the district, or creating a separate Distribution List at each school which would then roll into the district list and on to the state shared list. Either method is correct; the approach should depend upon district needs and resources. Please consult your KETS Regional Engineer for help with determining how district lists should be designed.

EXAMPLE

- A Distribution List (e.g., **Johnson Co Foreign Language Club**) contains the names of individuals that have e-mail accounts (e.g., Elvin Hayes) on the school or district e-mail server. This list is set up so that mail can be sent to the members many different smaller groups who have an existing Distribution List (e.g., **All Johnson Central Foreign Language Teachers, Johnson Central Spanish Students, Johnson Central French Students**). These three smaller groups are designed to automatically roll-up into the bigger group. The List Administrator (who could be a student) for each of the smaller lists is responsible for keeping the names current for his or her group (French students, like Elvin Hayes, or Spanish students). Perhaps the Spanish Teacher is responsible for keeping the Foreign Language teachers' names. By carefully designing the way these lists relate to one another, the district can make it possible for a French teacher, for example, to communicate with the bigger audience of **All Johnson Central Foreign Language Teachers** or to limit more specific communications to **Johnson Central French Students**.

NAMING STANDARDS FOR DISTRICT LEVEL COMPONENTS OF AN ALL STATE SHARED DISTRIBUTION LIST

- ⇒ Each district must establish the elementary, middle, and high school levels of Distribution Lists then they are components of an All State Shared Distribution List. Even if the population of a particular group in the district is small, a separate List must be established for each level so that design for state level roll-ups is not degraded.

⇒ **Use the following naming standard** for district level components of these lists:

State Level List	District Distribution List Naming Standard	Example
All State Supt	All District Name Supt	All Mason Co Supt
All State EL Prin	All District Name EL Prin	All Mason Co EL Prin
All State MS Prin	All District Name MS Prin	All Mason Co MS Prin
All State HS Prin	All District Name HS Prin	All Mason Co HS Prin
All State Prin	All District Name Prin	All Mason Co Prin

Do not use “MC Superintendent” (put in All, spell out district name fully and truncate to Supt)
 “Elliott EL Prin” (put in All, Co for County)
 “All Bellevue Independent Superintendent” (truncate to Ind and Supt)
 “All Principals” (include district name and truncate to Prin)

MEMBERSHIP STANDARDS FOR DISTRICT LEVEL COMPONENTS OF AN ALL STATE SHARED DISTRIBUTION LIST

- ⇒ The All District Name Superintendent List (**All Mason Co Supt**) will contain one mailbox, the Superintendent’s. Each district’s Superintendent Distribution List will roll up to the **All State Superintendents (All State Supt)** Distribution List that will be available to all Kentucky superintendents and others, as needed.
- ⇒ The All District Name Elementary School Principals List (**All Mason Co EL Prin**) will contain the mailbox for each elementary school principal in the Mason County School System. This Distribution List will roll up to the **All Mason Co Prin** List and the **All State EL Prin** Distribution List that will be available to all Kentucky elementary school principals and others, as needed.
- ⇒ The All District Name Independent Middle School Principals List (**All Bellevue Ind MS Prin**) will contain the mailbox or Distribution List for each middle school principal in the Bellevue Independent School System. This Distribution List will roll up to the **All State MS Prin** Distribution List that will be available to all Kentucky middle school principals and others, as needed.
- ⇒ The All District Name High School Principals List (**All Montgomery Co HS Prin**) will contain the mailbox or Distribution List for each high school principal in the Montgomery County School System. This Distribution List will roll up to the **All State HS Prin** Distribution List that will be available to all Kentucky high school principals and others, as needed.
- ⇒ The All District Name Principals List (**All Glasgow Ind Prin**) will contain 3 Distribution Lists: The **All Glasgow Ind EL Prin** Distribution List, the **All Glasgow Ind MS Prin** Distribution List, and the **All Glasgow Ind HS Prin** Distribution List.
- ⇒ District level components of All State Shared Distribution Lists must be given a Trust Level of 15. Today, there are only five such lists at the state level:
 - **All District Name Supt**
 - **All District Name Prin**
 - **All District Name EL Prin**
 - **All District Name MS Prin**
 - **All District Name HS Prin**
- ⇒ All district Distribution Lists which are not local components of a state level list must be given

a Trust Level 20 so that they are not propagated to every other school and district in the state.

(Trust Levels are set by selecting the Advanced Tab for each item. Steps for setting up a District or Statewide Distribution List are outlined in the attached checklist.)

Because All State Shared Distribution Lists may contain hundreds of recipients, it is important to use them wisely. For example, large attachments sent to hundreds of recipients create considerable traffic on the network. This results in slower response rates for all users.

⇒ If the attachment is over 1.5 MB in size, the e-mail must be sent without the attachment. The attachment must be placed on the web site of the originating organization. The e-mail should direct recipients to the appropriate URL.

ACCURACY AND CURRENCY STANDARDS FOR DISTRICT LEVEL COMPONENTS OF AN ALL STATE SHARED DISTRIBUTION LIST

⇒ Updates to district level components of the following Distribution Lists shall be made within five working days of personnel changes:

- **All District Name Supt**
- **All District Name Prin**
- **All District Name EL Prin**
- **All District Name MS Prin**
- **All District Name HS Prin**

Chapter Nine Scheduling E-mail

Exchange includes the capability for a user to schedule the sending of email. The user can delay the sending until a specified amount of time has passed. So, if it is 4:00 p.m. and the user wants the email to be sent after 7:00 p.m., the user schedules the email to be sent after a three-hour delay.

WHY SCHEDULE EMAIL?

Throughout the day when students and teachers are in school, the primary function of the network is instructional. Large emails or emails too large Distribution Lists may slow the network or create bottlenecks that interfere with instructional use. The Department recommends that users schedule large emails to be sent after the school day ends.

HOW DOES A USER SCHEDULE EMAIL?

To specify a time to send a message after composing:

- Step 1. From the File menu in the Exchange client, choose Properties;
- Step 2. Under Options For This Item, click Send Options; select the Microsoft Exchange Server tab, and then;
- Step 3. Under Send This Item, select In; then specify the number of minutes, hours, days, or weeks in which the message should be sent.
- Step 4. Choose OK.

Chapter Ten Creating Personal Distribution Lists

Exchange includes the capability for a user to create Personal Distribution Lists from his/her Personal Address Book.

WHY CREATE PERSONAL DISTRIBUTION LISTS?

If a user frequently sends messages to the same group of people, and a district Distribution List is not available for that group, the user should create a Personal Distribution List (PDL) to send to those individuals. Personal Distribution Lists do not have Trust Levels, as they exist on the users' local machine.

WHEN IS A PERSONAL DISTRIBUTION LIST APPROPRIATE?

If Woodford County wants to create a Distribution List for all 4th grade teachers belonging to the Pep Club committee, they have three options:

- Option 1. A Statewide Distribution List or this group would not be appropriate. No other district would need to send to this group.
- Option 2. A District Distribution List might be appropriate if there were a significant number of 4th grade teachers in the Pep Club. This would have a Trust Level of 20, keeping it from replicating across the state.
- Option 3. A Personal Distribution List is probably the most appropriate, being created and kept by the person in charge of the Pep Club. Again, there would be no Trust Level on this Distribution List, because it is on a user's local machine.

HOW DOES A USER CREATE PERSONAL DISTRIBUTION LISTS

To create a Personal Distribution List:

- Step 1. From the Tools menu in the Viewer, choose Address Book, or click the Address Book button.
- Step 2. From the File menu, choose New Entry, or click the New Entry button.
- Step 3. In the Select The Entry Type box, select Personal Distribution List.
- Step 4. Under Put This Entry, select In The, and then select Personal Address Book.
- Step 5. Choose OK.
- Step 6. In the Name box, type the name you want for the personal Distribution List, and then choose Add/Remove Members.
- Step 7. Double-click each name that you want to add to the PDL, or select each name and choose Members.
- Step 8. Choose OK until all open dialog boxes are closed, and then choose Close from the File menu.

HOW DOES A USER DELETE A PERSONAL DISTRIBUTION LIST?

When a Personal Distribution List is no longer used, the user should delete it. These Lists may go out of use because they were associated with a temporary project or because the group has been incorporated into a district distribution list. To delete a Personal Distribution List:

- 1. From the Tools menu in the Viewer, choose Address Book, or click the Address Book button. In the Show Names From The box, select Personal Address Book.
- 2. Under Type Name Or Select From List, type or select the name of the personal Distribution List you want to delete, and then choose Delete from the File menu, or click the Delete button.
- 3. When you are asked to confirm the deletion, choose Yes, and then choose Close from the File menu.

Chapter Eleven Standards and Guidelines for Personal and District Level Distribution Lists

(see Chapter Seven: Standards for District Distribution Lists Which Feed Statewide Shared Distribution Lists. Chapter Ten pertains to all other lists.

DELIVERY RESTRICTIONS

As mentioned above and on the Checklist, you can give rights called Delivery Restriction to a Distribution List. By default, there are no restrictions. Any user who can find that Distribution List in his or her address book can send to it. The user may choose to set restrictions on a Distribution List. Note that if you choose to “Accept Messages From” a person or another Distribution List, you restrict everyone else. You can also choose to “Deny Messages From” and provide a list of persons or Distribution Lists who cannot send e-mail to this Distribution List.

For example, if a user creates a Distribution List and gives it no restrictions, anyone can send to it. If the user sets the “Accept Messages From” option to “Hackworth, Robert”, then Robert is the only person who can send to it. Conversely, if you set the “Deny Messages From” option to “Hackworth, Robert”, then everyone but Robert can send mail to it.

- ⇒ The All State Shared Distribution List Administrator must retain access rights to all of the district components of the State Level Shared Distribution Lists

ACCURACY AND CURRENCY

Be sure to keep Distribution Lists up-to-date. Give ownership of the Distribution List to an appropriate person who has a vested interest in the accuracy and currency of the information. For example, a school staff member, rather than the DTC, could maintain a Distribution List for a specific school.

Ensure that each List Administrator has a trained backup.

The standard for updating district level components of All State Shared Distribution Lists is five days. It is recommended that districts set a similar update standard for other district level lists.

TRUST LEVELS

When creating a new mailbox or Distribution List, the trust level is set to 20 by default. Items with a trust level of 20 are seen in the home district only; they are not visible in the statewide Global Address List.

- ⇒ The following mailboxes and Distribution Lists do not need to be seen outside the district. The Trust Level on the following must be set to 20:
- Generic accounts such as “receptionist”, “high school”, “counselor”, or databank accounts, that do not refer to a specific person, but instead refer to a position that might be filled by several people.
 - Generic administrator accounts, such as HS Admin (this does not include the Exchange Administrator Account). Today, if you search the Global Address List for ‘administrator’, you will find there are more than 70 mailboxes named “administrator”. These ‘administrator’ mailboxes are not used to send mail to users in this system and should not show up in the Global Address List. Setting the trust level of the “administrator” mailbox/custom recipient to 20 will prevent it from replicating into the state’s Global Address List.
 - Student accounts – to protect privacy student names will not be visible on the GAL beyond the home district. (This standard is directly related to 1998 Senate Bill 230. Failure to comply with this standard will result in the district’s connection to the KETS Mail Service being suspended until all student accounts are removed from the GAL.)
 - All Distribution Lists other than the five mentioned in this guide.

Chapter Twelve Naming Conventions

(Information in this Chapter pertains to all Distribution Lists. See Chapter Seven for additional information on naming district level components of All State Shared Distribution Lists)

It is important to have consistent naming within address lists (Global, Personal, etc.) A structured model eases the management of a large system such as KETS (45,000+ users). Refer to the attached checklist for information about dates for achieving compliance with naming standards.

AUTO NAMING

WHY IS AUTO NAMING IMPORTANT?

Having Auto Naming set correctly will set up the Display Name and Alias automatically, conforming to the state standard. Auto Naming uses the Display Name field to generate the proper Alias. If the Display Name is "Robert Hackworth," the Alias will be "rhackwor," following the standard.

- ⇒ Districts must use Auto Naming and Auto Naming be set up as follows:
 - Step 1. From the Exchange Administrator program, go to Tools>Options.
 - Step 2. Display name generation should be set to "Last, first."
 - Step 3. Alias name generation should be set to "Custom; %1First%7Last."

This will insure all new accounts are set up appropriately. As you create a new mailbox, you will type in the first and last name of the person in the fields provided.

EXCHANGE E-MAIL ACCOUNTS

- ⇒ The "Display Name" (user name, e.g., Smith, Amy) and "Company" (district name, e.g., Franklin County Schools) fields must be filled in for each mail recipient.

This is necessary to help people within and outside the district correctly identify the teacher or other staff member to whom they wish to send mail.

DISPLAY NAME

- ⇒ All names must be displayed "Last Name, First Name" using upper and lower case. (e.g. Smith, Amy, not 'Amy Smith' or 'AMY SMITH' or 'SMITH, AMY')

Following this standard will make it much easier for anyone to find the person for whom he or she is looking. The Global Address List is also much easier to read if all consistent conventions are followed.

- ⇒ If a district chooses to add an identifier, such as the person's title, beside the Display Name, use the standard of "space hyphen space" after the name, followed by the identifier. (E.g. Smith, Amy - DTC or Johnson, Mike - Superintendent)

A list of titles can be found on the Professional Staff Data (PSD) System. It can be downloaded from the KDE website by:

- Step 1. Go to <http://www.kde.state.ky.us>
- Step 2. Click on Management and Support Programs
- Step 3. Click on Finance
- Step 4. Click on PSD

COMPANY NAME

The “company name” is the district name.

- ⇒ Every mailbox in the district must have the “Company Name” field completed as the District Name.
- ⇒ The Company Name must be consistent within the district. Every member of a district shares the same Company name. (example: Franklin County Schools; Danville Independent Schools)

WHY CONSISTENCY IS IMPORTANT

Several teachers throughout the state have the same name, or names that are very similar. These teachers often receive mail intended for others. Company (District) Name helps the sender accurately identify the intended recipient.

OTHER MAILBOX FIELDS

The remaining mailbox fields (e.g., Department, Title) may be filled in, but are not required. However, this additional information helps users properly identify one another

The following are guidelines for some of the remaining fields:

- ⇒ The “Department” field may be used for the building or school with which one is associated: for instance, “High School,” “Bus Garage” and “District Office.” Note that the entire name should be spelled out, or enough of the name should be spelled out that anyone can understand it. Example: For the mailbox of a person who works at Western Hills High School, enter “Western Hills High School,” not “WHHS” or simply “HS.”
- ⇒ The “Title” field should be used to represent the professional title. A list of titles can be found on the Professional Staff Data (PSD) System, as stated above in the discussion of “Display Name.” The Title field distinguishes E-mail recipients by their roles for those who may not know the individual’s name. One might want to send to the School Technology Coordinator in a school, but might not know what that person’s name. In that case, the user could simply look at “Company,” “Department,” and “Title” to find the appropriate person.

Always keep in mind that these mailboxes will be seen outside your district. A mail system which follows naming standards and best practice guidelines will be used more routinely by more people.

MICROSOFT MAIL ACCOUNTS

Several districts utilize Microsoft Mail 3.5 post offices in conjunction with Exchange.

- ⇒ Microsoft mail accounts must follow the naming standards described above.

Changes to the “Display Name” of all Microsoft Mail accounts must be made on the Microsoft Mail Post Office itself through the Administrator program, rather than through the Exchange Administrator Program. These changes are synchronized into the Exchange Recipients container daily. All other fields will be filled out through the Exchange Administrator Program. Since the Microsoft Mail Admin program does not provide the fields “Company,” “Department,” etc., Directory Synchronization from Microsoft Mail to Exchange will not overwrite these fields. It will, however, overwrite the “Display Name” field.

Chapter Thirteen Public Folders

Unlike mailboxes and personal folders where you store information for an individual or small

group of individuals, public folders are an easy and effective way to collect, organize, and share information with others on a project team, in your school, or in the district.

WHY PUBLIC FOLDERS ARE USEFUL

Public folders are easily accessible from e-mail, ensuring that everyone in your district has the most up-to-date information no matter where they are: at the office, at home, or on the road. Public folders are created and designed by administrators and other users who have been given permission to do so. They can be used as Bulletin Boards, to maintain reference information (like your Exchange Getting Started Guide!), or to subscribe to listserves.

The listserve use creates efficiencies within the mail system, keeping numerous users from subscribing to the same listserve as individuals. Such use keeps down on the amount of e-mail traffic within the district and on the KETS backbone.

The information in a public folder can be in any format: message; forms; or file. Public Folders can be used very much like shared directories on a File and Print server for small amounts of data. Districts are strongly cautioned against allowing Public Folders to fill up most of the free space on the Exchange server. If the server runs out of disk space, it will crash.

HOW TO CREATE A PUBLIC FOLDER

To create a Public Folder:

- Step 1. Open the Exchange client
- Step 2. Under your district's Public Folder (Ex. Public Folders > Districts > *Cumberland*)
- Step 3. Highlight the folder where you want to create the new folder
- Step 4. Select File>New Folder
- Step 5. Specify the name of the new folder (for example, "Test Scores")
- Step 6. Assign client permission rights to the folder from the Exchange Administrator program under Properties.

The creation of Public Folders should not happen haphazardly. Like any filing system, a structure for categorization, naming, content organization, and retention should be adopted and applied consistently. Think of a Public Folder as if it were a hard drive or paper filing cabinet.

Chapter Fourteen Other Mail System Configuration Options Which Impact Service and Reliability

Districts must not make any modifications to routers, NT servers, Exchange servers or other mail system devices without understanding the repercussions.

- ⇒ Districts must not make changes that will negatively impact that district's or other district's compliance with the KETS Electronic Mail Standards.

KETS standards provide consistency throughout 176 districts so that a user can go from one district to another using the same functions, features, and naming standards. Exchange is a statewide system; anything one district does that diminishes consistency and reliability impacts the rest of the districts.

- ⇒ All settings in the Configuration Container need to remain as configured during the district's initial Exchange installation. Changes to your site configuration may affect districts. If you feel a change needs to be made, consult the Help Desk or your KETS Regional Engineer.

If you have to rebuild your Exchange Bridgehead Server, contact the KETS Help Desk before doing so. Settings have to be modified on the backbone server (which is discussed below in

KETS E-mail System Design) when the server that we connect to in a district is modified or reinstalled. Again, this does not apply if you are rebuilding a secondary Exchange server; it only applies to your bridgehead server.

- ⇒ Do not reconfigure any ports on the router unless directed to do so by the Office of Education Technology. Filtering ports can cause E-mail delivery failure, as well as restricting district access outside of the district. When E-mail cannot be delivered to a district, for whatever reason, the backbone server trying to send to the 'down' district spends all of its time trying to connect to that server. This will cause the backbone server to stop delivering to all other districts it is configured to support.
- ⇒ Do not change the SMTP address. Again, this is a Configuration container setting that was set correctly during the initial install. It is important to have a standard in place for SMTP addresses. If a person wants to send to an Internet mail address in McLean they can surmise from naming standards that the address would be "name@mclean.k12.ky.us."
- ⇒ The one setting you can and should change is to disable Internet SPAMMING from your Exchange Server. This is where people can 'bounce' e-mail off of your server, sending the mail to anyone they want, and it will be tracked back to your district.

The procedures are as follows:

Open Exchange Administrator

In the left pane under your Site (district name), go to *Configuration* and then *Connections*

In the right pane, double click on your Internet Mail Service (it will have your server name after it)

Go to the *Routing* tab and make sure under the Routing window that your Internet address is accurate for *Sent to:* and it is set as Inbound for *Route to:*

If you have no users using POP/IMAP clients (Eudora, Outlook Express, Netscape, etc), you need to select/check the **Do not reroute incoming SMTP mail** radio button at the top of the screen. Hit OK and restart your Internet Mail Service in Control Panel>Services.

If you have users with POP/IMAP clients accessing e-mail, you need to select/check the **Reroute incoming SMTP mail (required for POP3/IMAP4 support)** radio button. Then you must click the *Routing Restrictions* button and select/check **Hosts and clients that successfully authenticate**. Choose OK twice and restart your Internet Mail Service.

- ⇒ SMTP, WINS and DNS Server IP Addresses are hard-coded in Client configurations and must not be changed. These three services must be run on the same server.

For best overall performance within the district, your Bridgehead Server should also be a Domain Controller. This applies to the Bridgehead Exchange server that has the X400 connector to KDE. This does not apply to secondary Exchange servers, which are usually placed in schools and only host Exchange mailboxes.

Note: To find out which server is your Bridgehead Server, go into the Exchange Administrator program. On the left pane, go to *Configuration*, and then *Connections*. On the right pane, you will see *X400 – KDE*. Highlight it. Then, from the File Menu, go to *Properties* and you will see 'Remote MTA name'. This is your Bridgehead Server.

- ⇒ Address Book Views are not to be created. They are replicated out to all schools and districts sites, impacting the rest of the E-mail Service. Changing Address Book Views causes the 45,000+ Global Address Book entries to be updated. Users with 16-bit clients, such as Windows 3.11 and Macintosh machines can not handle the processing required to make this change and the client workstation crashes.
- ⇒ The Trust established during the initial installation of the NT/Exchange Server with the KDEMAIL domain must remain intact.
- ⇒ The KDEMAIL Administrator Permissions Admin rights on the following containers in Exchange must remain intact: the KETS Org, the district site, and the Configuration container.
- ⇒ All recipients must reside in the Recipients container. Subcontainers can not be accommodated. To protect our students' privacy, their mailboxes are not visible beyond their district. Setting the Trust Levels to 20 prevents the accounts from appearing in the Statewide Global Address List.
- ⇒ Once a week, replication must be done from each district. Replication updates changes to the directory such as new users or changes to Distribution Lists. Each mailbox or Distribution List with a trust level of 20 must be worked around as replication is requested. The program is run against the Recipients container only. It is not run against any subcontainers within the Recipients container.
- ⇒ Any district with additional containers will not participate in Directory Replication until the additional containers are removed and the matter is cleared with the district's KETS Regional Engineer.

Chapter Fifteen The Kentucky Education Technology System E-mail Design

It is important for each district to understand the statewide email system design. There are 8 'Backbone' or 'Hub' servers. These are Exchange Servers just like those within each district except that they do not hold mailboxes; these servers act as Message Transfer Agents (MTAs) or mail gateways, passing mail from district to district.

All districts point directly to one of these eight servers. The eight servers correspond with the eight regions; each district in Region 6 connects into one backbone server, KDEHUB6. Obviously, if this server is down, the districts in Region 6 cannot send mail outside the district unless it is Internet Mail. This is because each district has a unique Internet Mail Connector which will send SMTP mail directly out to the Internet, bypassing the backbone server.

The KETS Mail Engineers connect to district servers and troubleshoot problems daily. This is why it is imperative that state level engineers retain certain administrative rights to district Exchange Server. E-mail delivery problems for one district impact all districts. When a change is made to Exchange, NT, DNS, a router, etc., that change impacts the Mail Engineer's ability to diagnose and correct the problem for the district. More importantly, it impacts the backbone

servers and other districts throughout the state.

DIRECTORY REPLICATION

Any changes a district makes to accounts (create/modify mailboxes or Distribution Lists) are replicated to all other district's Exchange Servers if those accounts have a trust level of 15. This process cannot be automated.

To replicate Trust Level 15 accounts, but not Trust Level 20s, a process must be run that is very time consuming. It takes about 10 hours of connecting to each district, working around the Trust Level 20s, and manually performing replication. All districts cannot be synchronized everyday, because this would create way too much traffic on the backbone. Synchronization must occur over several days. This means that it can take up to a week before a change is seen in the Global Address List of another district. For that reason, if user "Smith, John" is added to a district's Exchange server on a Monday morning, that user might not show up in the statewide GAL until the following Monday.

- ⇒ Only district employees' mailboxes may be set to Trust Level 15.
- ⇒ All non-district employee mailboxes (contractors, vendors, students, etc.) must be set at Trust Level 20. For instance, if there are mailboxes created for local vendors to that district, they must be set to a trust level of 20, so that they will not be seen in the statewide Global Address List.
- ⇒ Individual student addresses are not to be replicated outside of a district, and must be set to a trust level of 20.